IMAC IT Subcommittee Meeting Minutes
Thursday, September 11, 2003 -- DHFS, 1 W Wilson St, Room 672

--Submitted by Jayne Wanless, DHFS

Present: Jim Jones, Debbie Bigler, Dave Hippler, Jayne Wanless, Sara Martin, Kathleen Luedtke, Laurie Teubert, Evie Ryan-Tondryk, Jill Jokela, Tony Sis, Seth Mandel, Donna King, Eduardo Zarate. Ken Funck and Gabe Koroluk joined at 10:30.

By teleconference: Bill Blank, Diane Peterson, Janice Tripp

Housekeeping
Jayne Wanless agreed to write the minutes for the September 11th meeting.

Minutes from the August 14th, 2003 meeting were distributed reviewed and approved.

Review Last Month's CARES Changes
Evie and Tony reported and asked for feedback from the counties on the following August CARES changes:

- Fein find Function: Counties like the change; still having trouble finding employers that are out of state or go under different names. A suggestion was made to have a directory similar to the phone book directory that would give suggestions on alternative names to look under. The state will check with UI to see if they have a cross-reference or a template could be used.
- Data Exchanges: IRS deletion: No comments from group
- EOS Benefit Recovery Reports: No comments from the group
- Variety of Food Stamp related Moves: No Comments from group

Tony Sis reminded the group of the web page www.dhfs.state.wi.us/em/cares_updates/2003/aug03_cares.htm where all the changes are displayed each month.

Review Next Month's CARES Changes
Next month CARES has two move dates, September 19th and the 26th. The new information will be available for workers on September 22nd and 29th.

The New Hire auto update that allows a cover letter and/or form to be sent automatically or manually moves on the 26th. Agency will receive an ops memo and power point.

Theresa requested feedback from the group on how local agencies use the power point, since this is the first time this method is being widely used by training staff. One local agency requested the power point be available a couple of weeks ahead of implementation so they can have time to review the information as a group, during a staff meeting which are only held periodically.

Notices telling recipients that they are not eligible for a program they did not request will no longer be sent.

Change center language will be added to notices for areas with an established center on 9/26 (currently its just Dane and Milwaukee Counties) added to the system so that any county can designate a call center and it can also support consortiums.

CARES Wish List

The AQIN change, which masks DOB and SSN for confidential cases, goes in on the 22nd.

When a worker selects to transfer all cases, a new message will be added to CMCA on the bottom of the screen to make sure the selection is correct.

Comment screens are now going to be available at the end of the driver flow in addition to the beginning, this will be available to workers on 9/22.

A living arrangement code is being added to AQCM. Currently, case members are displayed as either "A" active or "I" inactive, but workers wanted a reliable way to identify if these individuals are in or out of the household.

The CNIN change to suppress all notices for one day is scheduled to go in on September 26th. This does not work for cases with multiple workers or mixed cases. The group suggested that the suppression be linked to the worker's log in. This project will be pulled so this option can be explored.

Web Initiatives
Seth Mandel and Sara Martin from Deloitte Consulting shared the Client Registration, Application Entry Vision handout and walked the group through the proposed plan. This is for in-person and phone-in applications. Client Registration has search functions, collects basic information and program requests, determines priority service and sets a filing date. The clearance process is not run and SSN is not required at this point. The Application Entry subsystem also has a search function to determine if the primary person is known to CARES. General case information such as case status would be provided to help the worker evaluate matches and decide how to process. It provides a link to the case and can pass data forward and allowing the worker to select existing members and add new members. Then the worker enters program requests for each individual and the web-based program allows different filing date for each program. Medicare and Healthystart are going to be combined. Expedited benefit information is added along with household relationship and the household is split into members relevant to the case and those that are not. The SSN is collected for the relevant household members and then clearance is run. Following clearance the system collects non-financial individual information.

Seth polled the group to find out if agencies use CRRF, the agency referral screen. The group members said it is never used. The web group also asked how the flags on ANDA are used that identify blind, wheel chair users and other unique service needs. The group said right now the flags are not used but could be handy, possibly a special check off screen with notes. The group reminded the web team to remember partner agencies such as child support.

An End User Feedback group led by Dave Hippler will post surveys to CARES coordinators and request feedback from local staff about how the system is currently used and feedback regarding sample screens. The Eligibility Management Page will have a "Feedback" section for comments, DXBMs will be posted to allow workers to know when the web page is updated, it may be included in new worker training and may recruit local staff to be on a IT feedback group.

Automated Case Directory
Ken Funck distributed the handout "Automated Case Directory – Report Demo" dated September 11th, 2003. The automated case directory will require the worker/supervisor to start by going into Web Intelligence (WEBI). There are 17 prompted reports currently being tested and will be available on September 29th. Ken led the group through the 17 reports. The group decided "Individual Look Up" report would not be used by agency staff and may not be necessary to include in the case directory.

People who have WEBI access will automatically have access to the case directory reports.

Review Change Center Chart
Jim is still waiting for information to complete the chart. It will be available at the next meeting.

Other Business
There was no other business.

<u>Next Meeting</u>
October 9, 2003, DHFS Building, 1 W Wilson St, Room 672